



Introduction to the 2016 Texas Public Libraries Annual Report

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Texas State Library and Archives Commission

Library Development and Networking Division

Wednesday, January 25, 2017, 2:00 PM



What's covered

Reasons to report

Rules, deadlines

Accreditation

Annual report

Data collection portal

Resources

Why Report?

“Without data, all you are is just another person with an opinion.”
(Author Unknown)

Participation in National Public Library Data Collection System

<https://www.ims.gov/research-tools/data-collection>

Accreditation in Texas State Library System

Eligible to order free materials for the Summer Reading Program

If you don't report, we have no information about your library!



Rules

Texas Administrative Code §1.71 - §1.85
**Minimum Standards for Accreditation of
Public Libraries in the State Library System**

<http://tinyurl.com/TACaccreditation>

Rules



Texas Administrative Code

[TITLE 13](#)

CULTURAL RESOURCES

[PART 1](#)

TEXAS STATE LIBRARY AND ARCHIVES COMMISSION

[CHAPTER 1](#)

LIBRARY DEVELOPMENT

[SUBCHAPTER C](#)

MINIMUM STANDARDS FOR ACCREDITATION OF LIBRARIES IN THE STATE LIBRARY SYSTEM

Rules

<u>§1.71</u>	Definition of Population Served
<u>§1.72</u>	Public Library Service
<u>§1.73</u>	Public Library: Legal Establishment
<u>§1.74</u>	Local Operating Expenditures
<u>§1.75</u>	Nondiscrimination
<u>§1.77</u>	Public Library: Local Government Support
<u>§1.79</u>	Provisional Accreditation of Library
<u>§1.80</u>	Probational Accreditation of Library
<u>§1.81</u>	Quantitative Standards for Accreditation of Library
<u>§1.82</u>	Accreditation Based on Current Operating Budget
<u>§1.83</u>	Other Requirements
<u>§1.84</u>	Professional Librarian
<u>§1.85</u>	Annual Report
<u>§1.86</u>	Standards for Accreditation of Libraries Operated by Public School Districts, Institutions of Higher Education, Units of Local, State, or Federal Government, Accredited Non-Public Elementary or Secondary Schools, or Special or Research Libraries

Rules

§1.71 Population Assignment

Not based on geography

Assigned by sources of governmental entity
funding: city, county, school district



Rules

§1.85 Annual Report Due Date

*“A public library shall file a current and complete annual report with the Texas State Library and Archives Commission **by April 30.** Revisions to the annual report which would affect membership status for the next fiscal year will not be accepted after **July 31...**”*

Target ►►► **MARCH 31, 2017**





Resources

Texas State Library Annual Report webpage,
<https://www.tsl.texas.gov/landing/statistics.html>

LibPAS – data collection portal:
<https://tx.countingopinions.com/>



Resources

Library Development & Networking (LDN)

800-252-9386 toll free, in Texas

Valicia Greenwood, Library Statistics Specialist
valicia.greenwood@tsl.texas.gov, 512-463-5466

Stacey Malek, Program Coordinator
stacey.malek@tsl.texas.gov, 512-463-5532

QUESTIONS





Accreditation Benefits

TexShare card

TexShare databases

Interlibrary Loan ILL

Erate

Competitive grants

Other funding opportunities




Accreditation Criteria

Contact criteria

Published phone

Website



Anytown, USA Library

[About Us](#)
[News and Events](#)
[Kids & Teens](#)
[eShelf & Research](#)
[Adult Services](#)
[Contact us](#)

You are here: [Home](#)

This is an informational message. ×

« JANUARY 2017 »


Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

Welcome to Ploud - Public Library in the Cloud

Ploud is the public library web content management platform that is easy to use and runs the websites of hundreds of libraries across the country.

This content can be replaced and is here only to provide direction to start the process of updating your site. This

LOCATION



Your Public Library

Accreditation Criteria

- Financial criteria: increased for 2016
 - Expenditure criteria
 - Maintenance of Effort (MOE)
 - Government support



Maintenance of Effort

Rule §1.74 Local Operating Expenditures

Question 4.2: Local Funds used for Library Operating Expenditures

- + 3-year average
- + Calculated two ways
- + Exemption amount

Accreditation Criteria

Maintenance of Effort: Look it up!

<https://www.tsl.texas.gov/ld/pubs/arsma/index.html>

Tips and Tools

Tip sheet: Reporting Downloadables

[Word format](#) | [PDF format](#)

Tip sheet: Frequently Asked Questions

[Word format](#) | [PDF format](#)

[Population & MOE Planning Tool](#)(.xlsx)

A quick view of your library's population assignment and MOE for local fiscal year **2016** (question 4.2).

NOTE: May need to "Enable Editing" in Excel after downloading. Contact [staff](#) regarding issues or questions about this tool.

[Weekly Total Tool](#) (.xls)

A simple calculator for libraries with branches to determine unduplicated hours (question 11.3).

Indirect Costs Information

Indirect costs can be included when a library fails to meet Maintenance of Effort. An indirect cost is a cost incurred for a normal library operating expenditure that is not assigned to the library's budget, but paid for by a local government agency on behalf of the library.

Indirect Cost Examples - [Word format](#) | [PDF format](#)

Indirect Cost Documentation Sample - [Word format](#) | [PDF format](#)

Accreditation Criteria

RULE §1.81 (1A-7A): Per capita minimums

Library population Assignment	FY2015	FY2016
500,001+	\$13.82	\$13.89
200,001 – 500,000	\$11.95	\$12.01
100,001 – 200,00	\$9.60	\$9.79
50,001 – 100,000	\$8.00	\$8.16
25,001 – 50,000	\$5.31	\$5.42
10,001 – 25,000	\$4.25	\$4.34
5,001 – 10,000	\$3.97	\$4.05

Accreditation Criteria

RULE §1.81 (8A): Minimums **RULE §1.77: Government Support**

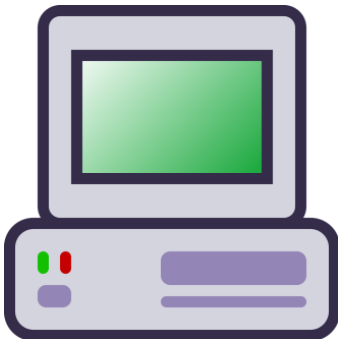
Population below 5,000	FY 2015	FY 2016
Per Capita Expenditures	\$3.70	\$3.77
Minimum Expenditures	\$10,650	\$15,000
Local Government Support	\$5,325	\$7,500

Accreditation Criteria

RULE §1.81: Quantitative Standards

RULE §1.83: Other Requirements

- ▶ Catalog that is electronically searchable
- ▶ Number of items in collection
- ▶ 1% of collection published in 2012* or later
- ▶ Long-range plan, updated every five years



*will change every year: published within last five years.

Accreditation Criteria

RULE §1.81: Quantitative Standards

RULE §1.83: Other Requirements

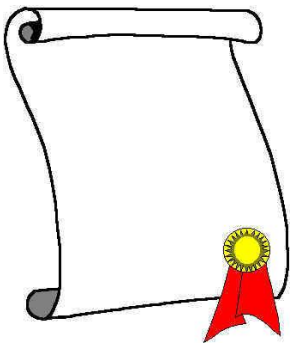
- ▶ Copier, computer for staff and public
- ▶ Interlibrary loan (ILL): Live on Navigator
- ▶ Hours library available to public



Accreditation Criteria

Librarian qualification criteria

- ▶ Professional librarians (libraries serving more than 25,000 persons)
- ▶ Number of hours employed
- ▶ Continuing Education requirement



QUESTIONS





Texas Public Libraries Annual Report

- ✓ Facility information
- ✓ Financial information
- ✓ Library operation statistics

Facility Information

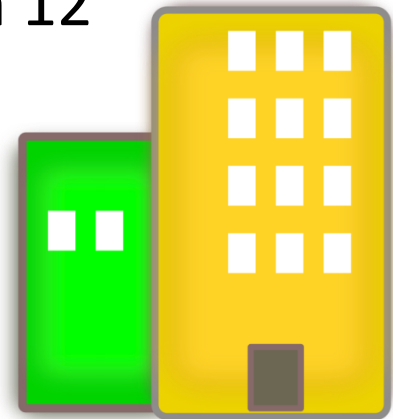
Section 1. Contact information

Section 2. Outlets

Renovations

Square footage

Branch details reported in Section 12



Financial Information

Section 3. Expenditures



**REPORT ACTUAL EXPENDITURES,
NOT BUDGETED AMOUNTS**

Financial Information

3.0 Did the library expend any funds from sources *outside the library's home county* such as Tocker Foundation, Dollar General, Hancher Foundation, Texas Book Festival, NEA, or similar sources?

If **Yes**, include in Section 3, but not in Section 4.

If **No**, include all expenditures from Section 3 in Section 4.

Financial Information

Section 3. Expenditures



3.1-3.11 Library Operating Expenditures

3.1 - 3.3 Staffing Expenditures

3.4 - 3.7 Collection Expenditures



Financial Information

Section 3. Expenditures

3.8 Other Operating Expenditures



3.12 Library Capital Expenditures



Financial Information

Section 4. Local Financial Effort

4.1 Local funds used for collection materials

Exclude grants from outside library's home county

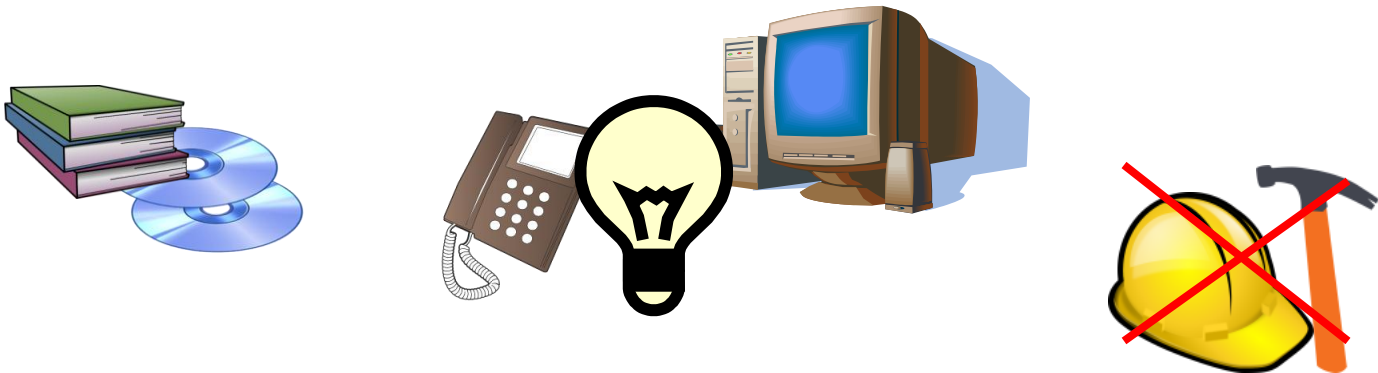


Financial Information



Section 4. Local Financial Effort

- 4.2 Local funds used for library operating expenditures. Used for calculating MOE.
- 4.3 Local government funds used for library operating expenditures. Accreditation criteria



Financial Information

Section 5. Revenues



Report revenues when received, whether expended (used) or not .

Financial Information

Section 5. Revenues

5.1 – 5.12 Revenues used for library *operation*

5.9 Grants: Local and non-local. **Indicate Source!**

- 5.10 Other local sources of funding: Friends, donations, fines, fees, etc.
 - ▶ No “in kind” amounts



Financial Information

Section 5. Revenues

5.13 – 5.21 Revenues used for *capital* expenditures

5.22 – 5.23 Revenue sources *outside* home county

Skip question 5.22 if all revenue came from local sources.

Library Operation

Section 6. Collection Counts

Physical materials: titles vs items

Downloadable materials: library vs
consortium



Library Operation

Section 6. Electronic Collections



6.10 Electronic Collections/Databases

6.11 TexShare/TexSelect



6.12 Consortial agreements



Library Operation

Section 7. Services

7.0 Long-range plan

7.1 Reference transactions

7.2 Library visits

7.3 Registered Library Users

7.4-7.8 Circulation: Physical vs digital

7.9-7.15 Programs: Events and Attendance



Library Operation

Section 8. Library Staffing

8.1-8.4,8.7 Staff hours worked

8.6 Director/head librarian's annual salary

8.9-8.10 Equipment available to staff



Library Operation

8.8 Continuing Education Sources



Library Developments Blog

<https://www.tsl.texas.gov/ld/librarydevelopments/>

CE Calendar

Professional Development webpage

<https://www.tsl.texas.gov/ld/workshops/index.html>



Library Science Video Collection

<https://www.tsl.texas.gov/ld/lsc/videos.html>



Library Operation

Section 9. Resource Sharing

9.1-9.2 Accreditation question: ILL

9.3-9.4 All ILL statistics



Library Operation

Section 10. Internet and Computer Use

10.1-10.3 Number of computers, usage

10.4 Training in electronic resources

10.5 Wireless internet access

10.6 Website visits



Library Operation

Section 11. Library Hours

Accreditation issue: unduplicated hours

Weekly Total Hours Calculator - COMPOSITE NUMBER OF HOURS								
<p>This chart is provided as an aid in calculating the total number of hours of library service provided by your main library and branches. Place a "1" in the space for each hour in which <u>one or more</u> of your library facilities is open. If a library is open only part of a given hour, enter "1/2", "3/4", etc. <u>Add</u> each column to determine the weekly total for a regular week. Report the totals in the spaces below, and then the total Weekly Total Amount in 11.5.</p>								
TIME	SUN	MON	TUES	WED	THUR	FRI	SAT	
7:00 - 8:00 a.m.								
8:00 - 9:00 a.m.								
9:00 - 10:00 a.m.								
10:00 - 11:00 a.m.								
11:00 - 12:00 a.m.								
12:00 - 1:00 p.m.								
1:00 - 2:00 p.m.								
2:00 - 3:00 p.m.								
3:00 - 4:00 p.m.								
4:00 - 5:00 p.m.								
5:00 - 6:00 p.m.								
6:00 - 7:00 p.m.								
7:00 - 8:00 p.m.								
8:00 - 9:00 p.m.								
9:00 - 10:00 p.m.								
DAILY TOTALS	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00 <= WEEKLY TOTAL



Application for Accreditation

<https://tx.countingopinions.com/main.php>

<https://www.tsl.state.tx.us/ld/pubs/arsma/index.html>



ACCREDITATION IN STATE LIBRARY SYSTEM APPLICATION

Local Fiscal Year 2016

This form must be completed by public libraries applying for accreditation in the State Library System and submitted on or before April 30, 2017.

LIBRARY NAME _____ CITY _____

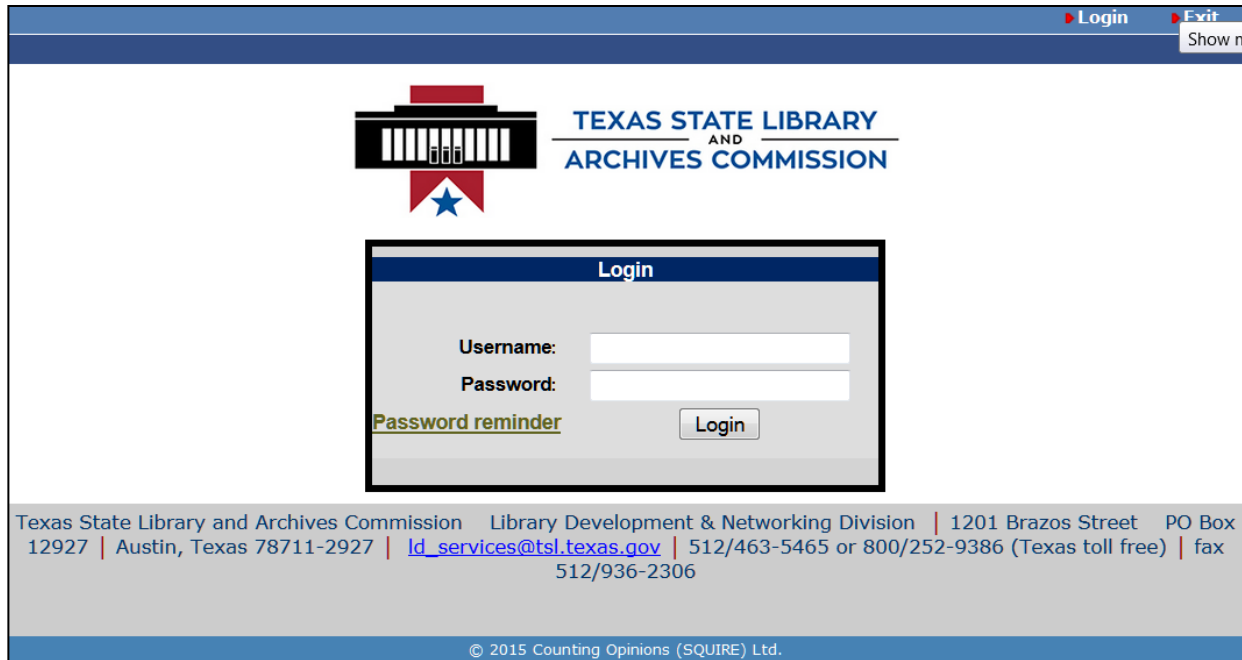
QUESTIONS



Online Data Collection


LibPAS

<https://tx.countingopinions.com/>



The screenshot shows a web browser window with a blue header bar containing 'Login' and 'Exit' links. The main content area features the Texas State Library and Archives Commission logo on the left and the text 'TEXAS STATE LIBRARY AND ARCHIVES COMMISSION' on the right. Below this is a 'Login' form with fields for 'Username:' and 'Password:', a 'Login' button, and a 'Password reminder' link. The footer contains contact information for the Texas State Library and Archives Commission, including the address '1201 Brazos Street', 'PO Box 12927', 'Austin, Texas 78711-2927', email 'ld_services@tsl.texas.gov', phone '512/463-5465 or 800/252-9386 (Texas toll free)', and fax '512/936-2306'. A copyright notice '© 2015 Counting Opinions (SQUIRE) Ltd.' is at the bottom.

Login Exit
Show n

 TEXAS STATE LIBRARY
AND
ARCHIVES COMMISSION

Login

Username:

Password:

[Password reminder](#)

Texas State Library and Archives Commission | Library Development & Networking Division | 1201 Brazos Street | PO Box 12927 | Austin, Texas 78711-2927 | ld_services@tsl.texas.gov | 512/463-5465 or 800/252-9386 (Texas toll free) | fax 512/936-2306

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Home Page



TEXAS STATE LIBRARY
AND
ARCHIVES COMMISSION

Welcome Texas State Library and Archives Commission

Click on the "[Enter](#)" button to access the online data collection form for your library.

Enter

The [TexShare Annual Report](#) is open.

Public library TexShare members - survey due January 31, 2017.

For more information on TexShare, visit the **TexShare Consortium Webpage**

<https://www.tsl.texas.gov/texshare/index.html>

The [Texas Public Libraries Annual Report](#) data collection form is also open.

This report must be submitted on or before April 30, 2017.

click here for: [Local Fiscal Year 2016 Population Estimate/MOE Calculation](#)

click here for: [Blank Copy 2016 Texas Public Libraries Annual Report Worksheet](#)

click here for: [Application for Accreditation in State Library System](#)

For additional information, visit the **Texas Public Libraries Annual Report Webpage**

<https://www.tsl.texas.gov/ld/pubs/arsma/index.html>

This site uses Pop-up windows which may be disabled in your browser.
Turn off the pop-up blocker for this URL address to open these documents.

Data Input

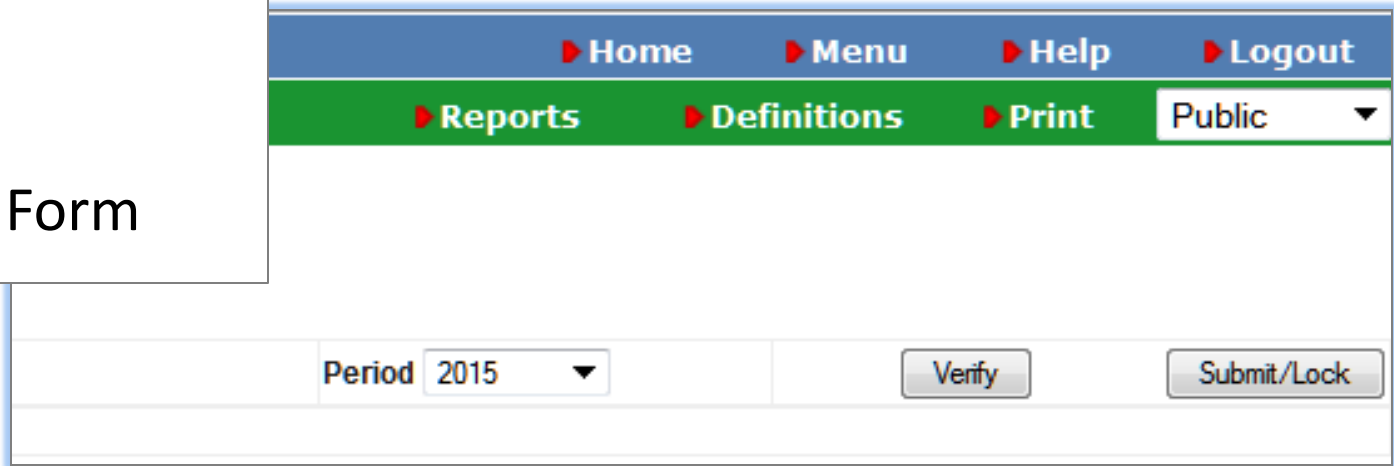
Form features

Home

Print

Period

Submit Form

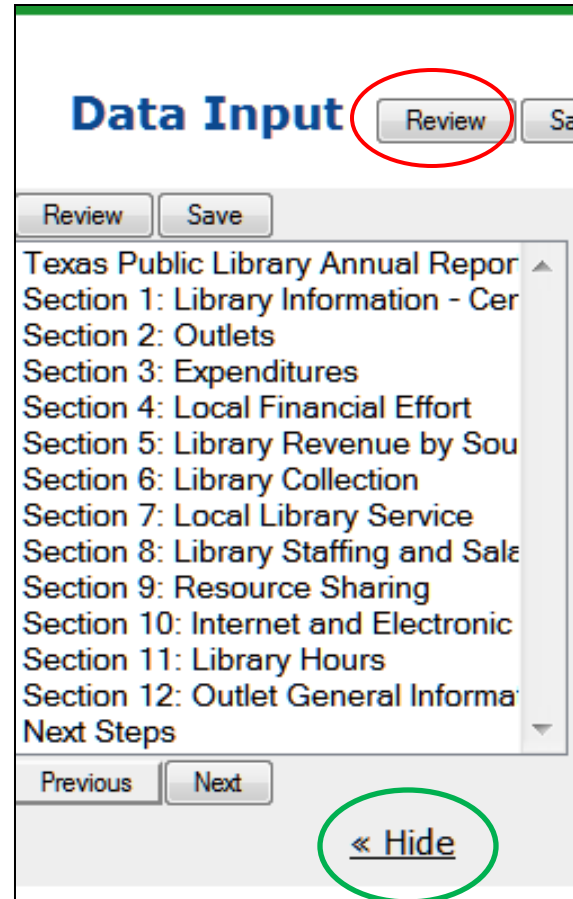


The screenshot shows a web application interface for data input. At the top, there is a navigation bar with a blue header containing links: Home, Menu, Help, and Logout. Below this is a green bar with links: Reports, Definitions, and Print. To the right of the green bar is a dropdown menu currently showing 'Public'. The main content area is white. At the bottom, there is a form with a 'Period' label, a dropdown menu showing '2015', a 'Verify' button, and a 'Submit/Lock' button.

▶ Home ▶ Menu ▶ Help ▶ Logout			
▶ Reports ▶ Definitions ▶ Print			Public ▼
Period	2015 ▼	Verify	Submit/Lock

Data Input

Navigation




The screenshot shows a web form titled "Data Input". At the top right, there are two buttons: "Review" (circled in red) and "Save". Below the title, there is a list of sections for data entry, including "Texas Public Library Annual Report", "Section 1: Library Information - Cer", "Section 2: Outlets", "Section 3: Expenditures", "Section 4: Local Financial Effort", "Section 5: Library Revenue by Sou", "Section 6: Library Collection", "Section 7: Local Library Service", "Section 8: Library Staffing and Sale", "Section 9: Resource Sharing", "Section 10: Internet and Electronic", "Section 11: Library Hours", "Section 12: Outlet General Informa", and "Next Steps". Below the list, there are "Previous" and "Next" buttons. At the bottom right, there is a button labeled "<< Hide" (circled in green).

Data Input

Annotations
Definitions

Include all operating expenditures from the library budget for microform, electronic, and other formats considered part of the library collection. Exclude charges or fees for expenditures for document delivery.

3.4 Print Materials Expenditures ✓ 

Indicator Notes

This is often useful for recording details about interpretation of the definition in local terms. Examples: who to contact for information, a translation of the text, etc.

Questions (indicator)	Print Materials Expenditures
Definition	Books, serial back files, current serial subscriptions, government documents, and any other print acquisitions.

Data Input

Edit checks/checkmark



6.2 Books in Print - Items ✓

Edit check

Current Value:

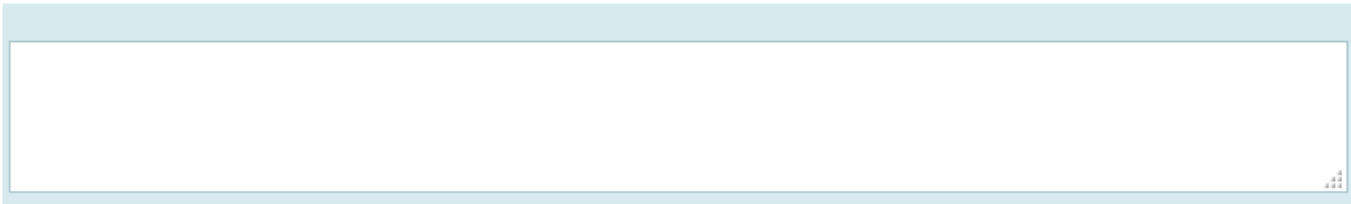
0

EDIT CHECK:

BOOKS IN PRINT ITEMS in 6.2 should not be less than BOOKS IN PRINT TITLES in 6.1

To Accept this value, please provide/select an explanatory Note, otherwise select Cancel to update the value.

Notes



Data Input

PI Value Notes ✕

3.4 Print Materials Expenditures

Input note here to explain the anomalous value, or select any existing note(s) (shown below, if applicable) to apply the selected note to the PI value.

Notes

Add

Cancel

Reports

▶ Home	▶ Menu	▶ Help	▶ Logout
▶ Reports	▶ Definitions	▶ Print	Public ▼
.			
Period	2015 ▼	Verify	Submit/Lock

Reports

▶ Data Input ▶ Library Trend ▶ Ranking Report

Manage Reports

To generate a report, select an existing report by Name (below) or use the Library Trend and/or Ranking Report links from the navigation bar (above). Use the Add button to Create a new report in a Local folder.

To Move or Remove one or more reports, select the report(s) (use the checkbox in the first column) and ...

Use the **Remove** button to remove the report(s) that you previously created.

Use the **Move** button to move the report(s) to another local folder that you previously created.

Published Reports (see below) are available to share with anyone, using the associated URL.

Local

TX

Annual Statistics

Demo Reports

Merge Documents

Report Name	Report Type	Collection	Description	Updated
Accreditation for State Fiscal Year 2017	Table	Texas Public Libraries Annual Report	published	2016-08-17 11:25:23
2012 Branch Statistics	Table	Texas Outlet Data Texas Public Libraries Annual Report	published	2014-09-11 12:19:24
2012 Texas Public Library Statistics	Table	Texas Public Libraries Annual Report	published	2014-09-11 12:19:06
2013 Branch Statistics	Table	Texas Public Libraries Annual Report Texas Outlet Data	published	2014-09-11 12:18:21
2013 Texas Public Library Statistics	Table	Texas Public Libraries Annual Report	published	2014-09-11 12:18:39
2014 Branch Statistics	Table	Texas Public Libraries Annual Report Texas Outlet Data	published	2016-08-12 10:22:36
2014 Texas Public Library Statistics	Table	Texas Public Libraries Annual Report	published	2016-01-21 15:09:50
Branch Statistics for Library Local Year 2015	Table	Texas Public Libraries Annual Report Texas Outlet Data	published	2016-08-17 11:20:11

Reports

Local

TX

Annual Statistics

Demo Reports

Merge Documents

Report Name	Report Type	Collection	Description	Updated
2011 Library Snapshot	DOCUMENT	Texas Public Libraries Annual Report	This is a snapshot of the library's local fiscal year 2011 data, as reported to the Texas State Library and Archives Commission. The document needs to be saved as a Word document (*.docx preferred), once it is downloaded.	2013-10-15
2012 Library Snapshot	DOCUMENT	Texas Public Libraries Annual Report	This is a snapshot of the library's local fiscal year 2012 data, as reported to the Texas State Library and Archives Commission. The document needs to be saved as a Word document (*.docx preferred), once it is downloaded.	2013-10-21
2013 Library Snapshot	DOCUMENT	Texas Public Libraries Annual Report	This is a snapshot of the library's local fiscal year 2013 data, as reported to the Texas State Library and Archives Commission. The document needs to be saved as a Word document (*.docx preferred), once it is downloaded.	2015-09-01
2013 Two-Year Comparison Report	DOCUMENT	Texas Public Libraries Annual Report	This three-page report lists the data from local fiscal year 2012 and 2013, as reported to the Texas State Library and Archives Commission. The document needs to be saved as a Word document (*.docx preferred), once it is downloaded.	2014-12-10
2014 Library Snapshot	DOCUMENT	Texas Public Libraries Annual Report	This is a snapshot of the local fiscal year 2014 data, as reported to the Texas State Library and Archives Commission. The document needs to be saved as a Word document (*.docx preferred), once it is downloaded.	2016-01-08
2014 Two-Year Comparison Report	DOCUMENT	Texas Public Libraries Annual Report	This three-page report lists the data from local fiscal year 2013 and 2014, as reported to the Texas State Library and Archives Commission. The document needs to be saved as a Word document (*.docx preferred), once it is downloaded.	2016-01-08
2015 Library Snapshot	DOCUMENT	Texas Public Libraries Annual Report	This is a snapshot of the local fiscal year 2015 data, as reported to the Texas State Library and Archives Commission. The document needs to be saved as a Word document (*.docx preferred), once it is downloaded.	2016-08-10
2015 Two-Year Comparison Report	DOCUMENT	Texas Public Libraries Annual Report	This three-page report lists the data from local fiscal year 2015 and 2014, as reported to the Texas State Library and Archives Commission. The document needs to be saved as a Word document (*.docx preferred), once it is downloaded.	2016-08-10

QUESTIONS





Contact Us!

Library Development & Networking

ld_services@tsl.texas.gov, 800-252-9386

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Stacey Malek, Program Coordinator

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